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ABSTRACT

Performance measurement at the University of South Africa (Unisa) library is integrated in its planning and review procedures and is continuously adapted and improved. This paper traces the development of performance measurement at Unisa over more than a decade. Performance measurement provides an indication of how good or bad the library is doing in relation to its goals and objectives and highlights problem areas to be addressed. Advantages of performance measurement at Unisa include the six-monthly planning cycle, which encourages the staff to focus on key performance areas; and the gradual development of the system, which has resulted in general agreement on all the objectives. Disadvantages to performance measurement include its time consuming nature; and the focus on the core business of the library and resultant overemphasis on operational goals. A recent strategic planning initiative and library restructuring resulted in a new performance review and planning approach with a more client oriented focus. Performance measures must be operationally significant, simple, meaningful, and must try to measure only things that are measurable. Performance measurement at Unisa has proven its value in the planning process and has assisted in improving and maintaining library service levels. The time and resources devoted to performance measure are regarded as an essential investment. Appendices include: library goals, objectives, standards, and achievements over time; reasons for performance failure (1994); interlending performance measurement and objectives (1990-1994); performance review and management planning report for the Document Delivery Division (August 1995); and performance indicators for the library and its individual divisions. A brief discussion with the author is provided. (SWC)

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The Impact of Performance Measurement on Library and Information Services: A Decade of Experience

by John Willemse

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The Impact of Performance Measurement on Library and Information Services: A Decade of Experience

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Introduction

With the exception of a number of projects which have been undertaken as pure research, performance measurement in libraries is usually done for one of two reasons. The first is that it is required by the library's governing body, which wants some form of accountability, usually from a financial perspective. In this case the measures are usually determined by outside persons, and very often without consultation of library staff. As a result library staff react negatively to performance measurement of this nature, predominantly because they regard the measures as inappropriate.

The second reason to measure the performance of a library is the library staff's own wish to know how well they are doing, to determine which areas of the library services need to be improved or to convince their authorities of their library's need for financial support (Willemse, 1989). The approach taken by libraries depends on their perception of organisational effectiveness. The complexities of organisational effectiveness and the widely divergent views that exist are clearly summarised in one of the most recent publications on the topic (McDonald, 1994). In the case of the University of South Africa (Unisa) the library has for many years expressed that its aim was to provide the best possible library service, and in fact that it wanted to be the best library. Although the library had been continuously improving its services, it had never measured its performance in any meaningful way. When lecturers from the University's Post-graduate School of Business Leadership (SBL) acted as consultants for the library in its endeavour to further improve its services in the late Seventies, the first question they asked was how we would know when we were the best. The ensuing discussion led to a realisation of the need for a process of setting clear goals and objectives for effective service from the user's point of view. This paper will describe the development of the use of performance measurement at Unisa as part of the library's integrated planning and control process in its continuing effort to improve its services over more than a decade. It is, therefore, a discussion of the application of performance measurement in the management of a library and will not be concerned so much with the actual performance measurement itself.

University of South Africa

The following background information on the University and its library will help to better understand the discussion of the process which is to follow. Unisa, which started as the University of the Cape of Good Hope in 1873, being the administrative mother institution for a number of university colleges, assumed a distance teaching function in 1947, when most colleges had become or were on the verge of becoming autonomous universities. Unisa was, therefore, one of the first universities to be devoted entirely to distance teaching. It is at present offering undergraduate as well as postgraduate studies up to doctoral level to over 128,000 students, mostly in Southern Africa. The Unisa Library, in contrast to those at most other distance teaching institutions, offers a full service to both staff and students. With almost 1.6 million volumes of books and journals and 7,000 current periodicals as well as a large collection of audio-visual materials, mainly in the humanities and social sciences, it is one of the largest research libraries in the country.

The library service to undergraduate students focuses primarily on the provision of literature recommended for assignments which students have to do in most courses. This service is provided by way of a separate Study Collection with multiple copies of the recommended titles in the main library in Pretoria as well as in branches in some of the larger urban areas. A large part of the circulation is done by post (Willemse, 1991).

The service to the teaching staff, researchers and postgraduate students is developed around a large number of subject librarians who, apart from being responsible for the development of the Collection, assist the researchers with literature surveys and obtaining literature not available in the library. For this purpose an excellent collection of bibliographical reference sources has been developed, which is supplemented by the latest CD-ROM and online information services available.

Start of Unisa Performance Measurement

The continuing average 9% per annum increase in the number of students during the Sixties and Seventies resulted in a strong growth in library collections and staff. This required that the organisational structure of the library be adapted from time to time to the changing circumstances. Lecturers from the SBL, who had been applying an integrated planning, control and performance evaluation system in the business sector, were keen to test this in a service environment and offered to assist the library in putting it into practice. Their system was basically a bottom to top approach, where in each section the staff with their supervisor and his/her immediate superior had to decide on those key performance areas which would most contribute to the success of the organisation. Agreement had then to be reached on measures which could be used to determine the level of performance. Each supervisor then had to report regularly to his/her superior on progress and planning for further improvement. Although this exercise was a big success from the point of view of determining exactly what supervisors required from their staff, many problems were encountered in finding acceptable measures for performance. The main reason for this was the staff's unfamiliarity with sampling techniques and their resultant mistrust of the findings. Our efforts to pressurise staff to accept measures for activities resulted in endless debates, as it was often felt that one measure that was decided upon did not measure the value of that activity adequately. The negative reaction which developed was so strong that the whole exercise had to be stopped.

On the positive side there was general agreement amongst the staff that the library did require a well formulated goal with measurable objectives which would indicate to what extent the library and its divisions were performing well. The SBL team's argument that an activity or programme had to make a measurable contribution to the realisation of the organisation's goal made sense, as each activity was using up a part of the available resources. From a management point of view it is, therefore, essential to determine to what extent these resources are being applied to realise the objective for which they were provided. It is also essential that the performance be continuously evaluated.

The ideal to make our library the best can possibly be regarded as vague, naive or even unrealistic. It was, however, very seriously intended. The senior staff of the library came to the conclusion that the best approach was to formulate a goal which took into account the reasons why the authorities were providing extensive funds for the library service, that is, as the most cost-effective means to provide staff and students with access to the publications and other information sources which they need as well as information which they may require. The goal also had to be in line with the reasonable expectations of users of the service. Objectives to realise that goal had then to be formulated in quantifiable terms, after which measures had to be found by which library management, university authorities and users could see to what extent the library was realising its goal. It should be stressed that Unisa's decision in this regard was based on the library management's ideal to develop an excellent service. At the start of the project little had been published on this topic in the library literature and the library, therefore, tackled the problem largely on an empirical basis (Willemse, 1987).

Mission, Goals and Objectives

Where the SBL had followed a bottom to top approach, it was now decided to follow a top to bottom one, starting with the formulation of the mission and organisational goals for the library by the Chief Director and the five heads of divisions. After they had reached agreement amongst themselves, the statements were discussed and further refined by a committee of staff from the middle management levels and eventually approved by the Library Committee. It was a slow process but the many discussions over a long period of almost two years had the result that it was widely accepted. The cornerstones of the mission statement were (1) the need actively to promote rather than just to support the university's programmes; (2) a clear distinction between the different needs of the two main user groups, namely undergraduate students on the one hand and lecturers and researchers (including postgraduate students) on the other; and (3) the view that the primary services to be provided were information sources and information itself. The need for community service was also realised, including the need for library co-operation. With time it was further realised that the library also had an obligation to educate its clientele in the effective use of library and information resources.

Although it had been agreed from the start that the main thrust would be on effectiveness, it was realised that efficiency was no less important and had also to be addressed. The summary of the library's mission, goals, objectives and measures as

it appears in Appendix 1 provides the situation as it has developed over time. It was agreed by the library staff that we had, in common with most service organisations, a large number of goals, but decided that we had to concentrate on a few of the most important ones.

Information Provision

The goal to provide information, or access to it, is perhaps the ultimate goal of any library. Due to the nature of Unisa's distance teaching function undergraduates have requested virtually no information services from the library in the past and goals or objectives were, therefore, only set for the provision of information for research addressing the needs of 3,000 students and the 1,400 academic staff. Their requirements are predominantly in respect of literature surveys for their research, which were addressed in the goals statement.

The objective to answer, upon request, the greatest possible percentage of bibliographic and information enquiries accurately and quickly has for many years posed a problem, as no acceptable measure to determine its effectiveness could be found. Most of the methodologies proposed in the literature were either not applicable to our situation or too time-consuming and costly to be used on an annual basis or more. A number of measures were tried and later discarded. Eventually a member of staff did a Masters thesis in library science on the topic (Dalton, 1991). Her study developed a quantitative user satisfaction assessment instrument for implementation as a management tool to evaluate user satisfaction levels with the quality of the service provided by the Subject Reference Division. A user satisfaction model, derived from the disconfirmation of expectations paradigm applied in consumer satisfaction research, which defines satisfaction as the difference between the average actual performance of the service provided and the average expectations of the user, was used. Having derived statistically-based quantitative levels of satisfaction for the different components of the subject reference service, a user satisfaction scale is proposed to regularly monitor user attitudes. Her findings provided an excellent basis for evaluating user satisfaction with the service of the subject librarians in general. They did, however, not provide an insight into the effectiveness of the information service and any specific problem areas.

The provision of information sources was seen as the primary function of the library. Most of its human and financial resources were, and are still used for that purpose. The next step was the formulation of the library's document or information source delivery goal in terms of effectiveness from the user's point of view. It was argued that users would perceive the service as effective to the extent that they would be able to obtain the required information sources. Separate goals for students and researchers, who had different needs, were decided upon. The initial objective was formulated as an ideal availability rate of 90%. This rate was decidedly unrealistic in view of the prevailing situation. As such an unrealistic objective has a negative or demotivating influence on the library staff, the long-term objective for effective provision of information sources was reformulated so as to provide the maximum quantity of required information sources upon request. The present situation serves as a point of departure and at each planning session an objective for a realistic improvement of performance has to be set.

Availability Performance

The first measurement of the effectiveness of document delivery was based on available data. This, however, proved to be too imprecise as it did not fully reflect failures of local users. At that time a methodology reported by the Library Management Research Unit in Britain was identified which, with a number of changes for our specific circumstances, has been the survey method used, according to which availability has been determined since 1985. Later further refinements were made, based on Kantor's methodology. In the beginning the surveys were done on a monthly basis, but this was rather costly and had to be reduced to quarterly ones. From the figures in Appendix 1, one can see a fluctuating, though in most cases slowly, improving performance. Although the improvements are not dramatic, it needs to be pointed out that during this period the book and journal budgets were under serious pressure and book acquisitions are at present below the level of 1982 whilst student figures have increased two-and-a-half times. The improved performance has to be attributed to the information resulting from our continuous performance measurement and the focused planning efforts to ensure greater effectiveness.

The information from the availability surveys, which are also designed to establish reasons for failure, have produced information which has in particular facilitated a continuous process to eliminate or rectify problem areas (Appendix 2). For instance, contrary to expectations the surveys have shown

that the main reasons for failure result from the fact that the required publications have already been borrowed by other users. This finding has lead to a number of actions to improve the situation. More money was initially made available for duplication of recommended titles. When, after a serious reduction in the book budget the performance showed a strong decline, an increase in the funding was obtained as a result of the data we could provide. Unfortunately, the present economic conditions have resulted in further unavoidable cut-backs. This has forced the library to look for other alternatives to maintain its performance. Shorter loan periods are, unfortunately, difficult to apply in the distance teaching mode, due to long periods required for postal despatch. The only other way open to us to ensure that requested material is available was to change the policy for recommended literature. After negotiations with the teaching staff it was decided to replace recommended books for first-year courses with so-called books of readings, containing the appropriate chapters of books and required journal articles, as a more cost-effective alternative. When even that was not sufficient, it was reluctantly agreed to further limit the number of titles that could be recommended per course.

The surveys also indicated that a large number of failures are due to the inability of the user to obtain the required material which was in fact available on the shelf. This lead to the addition of the goal that user education should be provided and a new post was approved for this purpose at a time when all other requests were turned down.

The library is now pursuing an active programme to educate its students in the use of library and information sources designed to reduce the percentage of availability failures due to users' inability to locate them. Amongst others, workbooks have been produced for first- and second-year students explaining the use of the library and general reference sources. For honours students similar guides have been produced on the subject reference sources for the various subject areas taught at the university.

So far the effect of this programme on the reduction of the failure rate has been rather small and further measures have to be taken. The fact that we have already identified and quantified this problem area is regarded as important.

Other problems were identified and addressed in a similar manner. Performance measurement does, therefore, not only provide an indication of how good or bad the library is doing in relation to its goals and objectives, but also highlights problem areas which can then be addressed. This is true not only in respect of availability, but also in other areas.

Interlending

The most dramatic improvements were for instance realised in interlending. Although immediate availability is the ideal, interlending offers a way to improve availability over time. With the goal of maximum availability in the shortest possible time, the Interlending Section of the Unisa Library has developed a number of performance measures to determine its effectiveness. The performance measures were instrumental in targeting problem areas which could contribute to a more effective service by technological and other means. Since about 14,000 publications are at present requested annually from other libraries, the effectiveness of this service is a major factor impacting on the overall effectiveness of the library.

Two of the most important dimensions of an effective interlending service are:

- the extent to which required publications can be obtained
- the time it takes to obtain those publications

Initially, the aim was to provide 90% of these publications within two weeks. The actual situation, however, indicated that this was totally unrealistic, as indicated by the early measurements taken in 1987 where a reasonable 86.3% of requested publications could be provided, but the average delivery time was 26.3 days. The advantage was, however, that the performance measures were refined, appropriate areas for improvement were identified and action plans developed to gradually increase the effectiveness of this service.

Various actions taken have already been documented (Willemse). Apart from the general measure used for reporting the library's improved performance in this area, more detailed figures available show that a substantial number of publications are now supplied within a week (Appendix 3).

Divisional Performance

When the library's corporate goals and objectives with their measures were in place, each division had to formulate its own goals and objectives. The latter had to be supportive of the library's overall goals. The following is a summary of goals that were developed over time together with their objectives and measures. The Acquisitions Division's goal was simply to obtain the sources

identified for addition to the collections. Its objectives were to do this (i) at the lowest cost; (ii) as quickly as possible; (iii) to the largest extent possible; and (iv) without unnecessary duplication. The measure in respect of the acquisition at the lowest cost was rather problematic as a norm to which we could compare ourselves was not available. A solution was found in comparing our costs to some of those of other large university libraries in our region on the basis of the data that is supplied to the Department of National Education.

In respect of cataloguing, the objectives were to do this timely and in order to achieve maximum retrievability. A measure for the latter was used whilst the card catalogue was still in use. When the library switched to a fully computerised catalogue no substitute methodology could be found to measure the effectiveness for this aspect of the service. For document access the goal was effective circulation control. The major contribution of this activity was to assure that borrowed materials are returned in time. The percentage of users who return their books before an account is rendered serves as a measure of this division's effectiveness. The objective was to minimise the number of accounts sent out to students. A further objective set was to minimise the number of books that had to be written off or replaced due to loss. The Study Collection's goal was the maximum availability of recommended literature when requested as well as the fastest possible despatch of books requested by students by post or electronically. Subject Librarians were set the objective of providing researchers with the maximum number of information sources in the library that they needed. Also requests for information should be answered as correctly and timely as possible.

These goals, objectives and measures were all agreed upon by the Chief Director, division heads and other senior staff in each subdivision. Although they may vary to a large extent from those used elsewhere or described in the literature, this is of no great concern to us. It is, however, regarded as absolutely essential that all persons involved, eg. the head and the persons reporting to him, should be in complete agreement as to what should be the goals and objectives of their section or subdivisions. Apart from the effectiveness measures mentioned above each division was also required to provide one measure of efficiency.

Advantages

The biggest advantage of the system lies in the annual and more recently six-monthly planning cycle. These regular sessions which the Chief Director holds with the divisional heads and other senior staff in each division, compel the staff to regularly consider what their role in the library is and the way in which they support the university's programmes. In particular it forces the staff to focus on their most important key performance areas. As the system was developed gradually, it has resulted in general agreement on all the objectives. Invariably new insights into old problems emerge as a result of the performance measurement which has gradually been done on a more sophisticated basis and which is adapted to collect information on particular problem areas. This has resulted in a number of problem areas which could be reduced or even disregarded.

Disadvantages

The biggest disadvantage of performance measurement is that it tends to be rather time consuming, particularly as staff would like their figures to be absolutely correct. The use of small samples which can provide an acceptable indication of effectiveness needs to be accepted. The performance measurement and planning system has greatly helped to focus on the core business of the library. This has, however, also had a very negative result in that it over emphasises operational goals. This might not have been a problem if proper attention had also been given to strategic planning, but for a long time nothing was done about this. When the library eventually undertook its first strategic planning exercise at the beginning of the 90s, which also produced a more client orientated mission statement, a number of very important strategic areas were identified ie. finances, affirmative action, rapid social change, democratisation, student demands and access to services and end-user requirements.

New Performance Review and Planning Approach

With the implementation of the strategic plan, which coincided with a restructuring exercise in the library, it was obvious that a completely new planning and reporting system was necessary. The five operational divisions were reduced to three, namely Technical Services, Document Delivery and Client Services. Two new staff divisions were estab-

lished, namely Client and Personnel Development and Management Support Services. The latter two were to address some of the concerns which were highlighted in the strategic planning exercise. Corporate workgroups with representatives from all the divisions were also given the responsibility for other strategic issues. As most of the issues had a bearing on the majority of the divisions, they were integrated with the operational planning.

Responsibility for the planning of strategic issues was given to the heads of divisions whilst the operational planning was done by the 14 subdivision heads. The guidelines for the new performance review and planning system implemented at the beginning of 1995 summarises the process as follows:

'Performance review and planning:

- focuses attention on the core business of a subdivision, its reason for existence, by identifying three to five Key Performance Areas, as the most important areas of functioning. KPAs are the important central functions of the subdivision.
- identifies the key output services and products (called products for convenience) of subdivisions. Products are the key outputs of the subdivision that are important for the clients, and whose performance is of importance to the overall effectiveness of the library. Hence the Chief Director is interested in performance measures relating to these products, how they perform, because they contribute to the overall success of the library
- identifies for each product one or more suitable performance measure that will enable operational managers and the Chief Director to assess how well the product is performing. Measures should be simple, easy to calculate, few, and relevant. A measure should identify what is most important to know about a product - its quality, throughput rate, delivery speed to client, or whatever is significant and useful to know about it. One or two measures per product is ideal.
- focuses the managerial process from Chief Director to line manager on operational performance and accountability for performance.
- becomes the centre of management control in a library that has become large and diverse in its operations, and difficult to co-ordinate and control.
- integrates cost control with output management.'

The term performance measure is used in the following context: 'Performance measures tell us how well a task is being done. Each product is supposed to do something specific, eg. information provision is supposed to provide a client with timely, accurate and relevant information. If these are the things that we should be measuring (this is a hypothetical example) then the performance measures would be timeliness, accuracy and relevance.

Performance measures and their targets are usually expressed as a ratio, eg. successful service transactions per user, or as a percentage, eg. percentage of items supplied within four working days. Raw output statistics do not constitute performance measures until they are related to a standard or target.

Each product should have some way for us to measure a relevant characteristic(s) which will enable us to say how successful the process is. We sometimes have to experiment with different measures of product quality and/or client satisfaction to discover which are the most indicative, meaningful and appropriate measures.

It is easy to go overboard with measures, to attempt to describe fully all the desirable qualities of the product. What is needed, however, is a measure that is

- operationally significant and tells the managers and staff, and the Chief Director, how well the product is performing
- simple - easy to use and understand.
- meaningful - really tells us how the product is performing
- does not try to measure the immeasurable eg. project work. Such work is reviewed by achievements rather than by measures.'

The results have been most encouraging and the planning documents which are revised on a six-monthly basis by the senior staff in each subdivision together with the division manager, are also briefly reported on a monthly basis, highlighting critical areas.

Examples of some of the revised strategic and operational documents are attached in Appendix 4 and a list of recently revised performance measures is supplied in Appendix 5.

Conclusion

Performance measurement at Unisa is integrated in its planning and review procedures. It has been developed over more than a decade and is continuously adapted and improved. The results of the

measurements provide new facts on many aspects of the library's service. These often confirm long-held beliefs, but also result in new insights.

As a result performance measurement has proved its value in the planning process and has greatly assisted in improving the library service and in maintaining service levels. The time and resources devoted to it are, therefore, regarded as an essential investment.

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Appendix 1

MISSION

The Department of Library Services as a service organisation, furthers the mission of the University of South Africa by:

	GOALS	OBJECTIVES	GLOBAL STANDARDS	ACHIEVEMENTS
Providing information and information sources to meet the information needs for study, teaching (particularly distance teaching) and research programmes				
Information Provision	To assist researchers, lecturers and post graduate students in the identification of and access to information	To answer, upon request, the greatest possible percentage of bibliographic and information enquiries accurately and quickly	Not yet developed	Not yet developed
Document Delivery (Study Collection)	To assist students registered for structured courses by the timely provision of the necessary recommended literature	The maximum quantity of recommended literature must be available and retrievable	% Resources successfully found by clients. Determine by surveys from 1989 only quaterly	% Success 1987 - 78,78% 1988 - 81,67% 1989 - 81,07% 1990 - 78,7% 1991 - 82,1% 1992 - 82,2% 1993 - 86,3% 1994 - 87,1%
Document Delivery (Research Collection)	To support present and future research and teaching by the selective acquisition, cataloguing and storage of information resources required for this purpose, and to make these available	The maximum quantity of information resources for research and teaching activitiesmust, upon request, be available and retrievable	% Availability of sources: monographs in Study Collection. Determine through surveys in 2nd & 3rd quaters of 1988	% Success 1988 - 79,5% 1989 - 85,5% 1990 - 86,2% 1991 - 84,1% 1992 - 86,1% 1993 - 88,3% 1994 - 89,0%
			% Availability of resources in periodicals section	% Success 1990 - 82,5% 1991 - 79,7% 1992 - 87,9% 1993 - 84,9% 1994 - 81,9%
Making the various resources of the Department of Library Services available to the wider community, where necessary and at the same time being able to use the resources of other libraries	To co-operate with other libraries in the collection and provision of information resources in the national interest and also for its own benefit	Information resources which are not available upon request will be supplied, where feasible, as fast as possible	Percentage and timeliness, measured on grounds of average of ILL numbers	% Days 1988 - 63,5% 21 1989 - 60,0% 21 1990 - 71,2% 21 1991 - 73,9% 21 1992 - 76,9% 21 1993 - 76,0% 21 1994 - 80,6% 21
	To make the libraries resources available to research communities other than the University, or those with which the library has reciprocal user agreements, selectively and on a cost-recovery basis	Not yet developed	Not yet developed	Not yet developed
Promoting the effective use of library services and information resources	To familiarise students, lecturers and researchers of the University with the use of the library and of library resources	The ability of students, lecturers and researchers to use the library independently and to maximally utilise its resources must be developed	Not yet developed	Not yet developed
Striving to be as efficient as possible	To manage the library in a cost-effective way	To achieve the highest possible number of issues per staff member	Productivity: Approved Posts: 276 Issues 1993: 883 980 Approved Posts: 281 Issues 1994: 807 745	1986 2 577 1986 3 055 1987 2 945 1988 3 220 1989 3 081 1990 3 007 1991 3 163 1992 3 095 1993 3 021 1994 2 875

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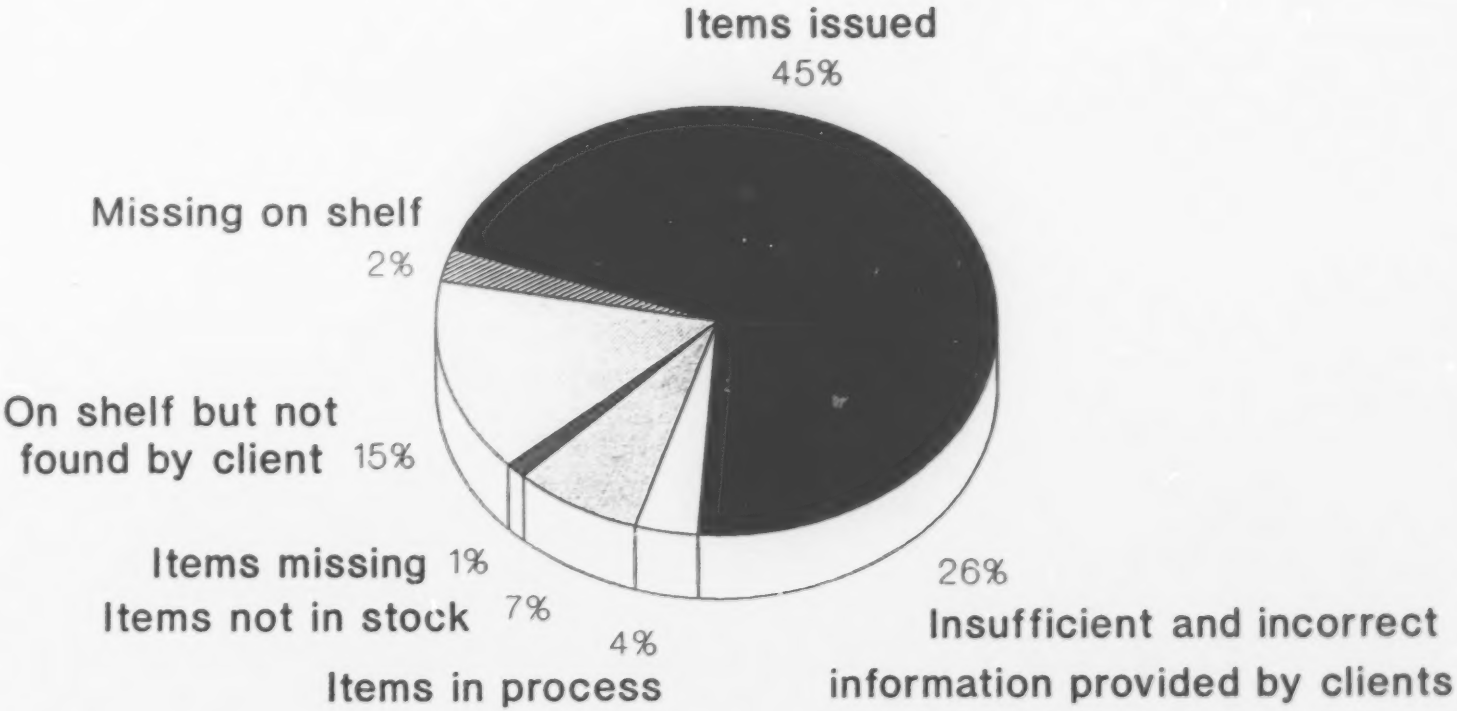
REASONS FOR FAILURE
1994



11

12

UNISA INTERLENDING
PERFORMANCE MEASUREMENT AND OBJECTIVE

OBJECTIVE: 80% RECEIVED WITHIN 21 DAYS

PERFORMANCE MEASUREMENT OF DOCUMENTS RECEIVED FROM VARIOUS SUPPLIERS (FIGURES ARE CUMULATIVE)															
Delivery days	1990			1991			1992			1993			1994		
	-7	-14	-21	-7	-14	-21	-7	-14	-21	-7	-14	-21	-7	-14	-21
S.A. Libraries	28,5	66,1	80,2	28,2	67,3	79,9	32,8	68,7	81,9	37,8	71,0	82,0	40,3	75,6	87,6
British Library	3,0	33,0	71,9	3,3	70,9	84,4	1,9	53,3	80,4	1,0	34,7	77,5	4,6	57,6	85,4
International via State Library	0,0	0,0	1,1	0,0	0,1	0,7	0,0	0,0	0,2	0,0	0,2	0,6	0,0	0,0	0,0
Data Search	-	-	-	0,0	8,9	60,3	0,0	18,4	52,5	1,9	5,1	44,2	2,7	11,6	45,2
UnCover	-	-	-	-	-	-	-	-	-	93,8	100,0	100,0	99,5	100,0	100,0
Kon. Bib, Den Haag	-	-	-	-	-	-	-	-	-	-	-	-	2,7	41,7	61,9
OBJECTIVE % ACHIEVED	22,1	54,9	71,2	21,8	61,4	73,9	24,9	61,3	76,9	27,4	57,9	75,8	29,9	64,6	80,5

DOCUMENT DELIVERY DIVISION
We deliver - fast & friendly

AFDELING DOKUMENTLEWERING
Ons lewer - vinnig & vriendelik

PERFORMANCE REVIEW & MANAGEMENT PLANNING: AUGUST 1995

Goal of Library

To satisfy clients' information needs and expectations by providing excellent service levels

Goal of Division

To provide clients with the required documents in the most appropriate format available and in accordance with clients' needs and expectations of service

OPERATIONAL KPAs & PRODUCTS (Form 3.1)
OPERASIONELE SPAs & PRODUKTE (Vorm 3.1)

DATE: July 1995
DATUM:

DIVISION: Document Delivery AFDELING:	PERFORMANCE REVIEW & MANAGEMENT PLANNING PRESTASIEOORSIG & BESTUURSBEPLANNING	COMPILED BY: A W Miso OPGESTEL DEUR:
SUBDIVISION: ONDERAFDELING:	Request Services	
Goal / Doelstelling:	To supply the right documents to be useful to clients	

KEY PERFORMANCE AREAS / PRODUCTS SLEUTEL PRESTASIE AREAS / PRODUKTE	MEASURES MAATSTAWE	OBJECTIVE/TARGET DOELWITTE	RESULTS/ACHIEVEMENTS RESULTATE/PRESTASIES		PLAN NO
1. BOOK REQUESTS					
• Processed requests (remote clients)	% SC and RC requests supplied within 2 working days	SC : 90% RC : 60%	1995	SC : 88,4% RC : 58,7%	20
	% remote client satisfaction (survey)	SC : 80% RC : 70%	1995	SC & RC : 89%	
• Shelved SC books	% shelved within 24 hours of return	100%	1995	100%	
2. PERIODICALS PROVISION					
• Processed requests (remote clients)	% periodical request supplied within 7 working days	70%	1995	87,2%	21, 22
	% remote client satisfaction survey	80%	1995	90%	
• Assistance provided (visiting clients)	% visiting clients satisfaction (survey)	85%	1995	89%	
• Shelved periodicals	% shelved within 24 hours after use	100%	1995	100%	
• Circulated periodicals / tables of content	% circulation point satisfaction (survey)	80%	n/a		23
3. PHOTOCOPYING SERVICES					
• Photocopied documents (remote clients)	% photocopies produced within 2 working days	90%	1995	95%	
• Assistance provided (visiting clients)	% client satisfaction (survey)	85%	1995	74%	25
• Photocopy facilities provided (campus clients)	% campus client satisfaction (survey)	80%	1995	n/a	26, 27

OPERATIONAL KPAs & PRODUCTS (Form 3.1)
OPERASIONELE SPAs & PRODUKTE (Vorm 3.1)

DATE: July 1995
DATUM:

DIVISION: Document Delivery AFDELING:	PERFORMANCE REVIEW & MANAGEMENT PLANNING PRESTASIEOORSIG & BESTUURSBEPLANNING	COMPILED BY: J M Mokoena OPGESTEL DEUR:
SUBDIVISION: ONDERAFDELING:	Lending Services	
Goal / Doelstelling:	To provide a client friendly and efficient lending service to visiting clients and ensure control of lending transactions	

KEY PERFORMANCE AREAS / PRODUCTS SLEUTEL PRESTASIE AREAS / PRODUKTE	MEASURES MAATSTAWE	OBJECTIVE/TARGET DOELWITTE	RESULTS/ACHIEVEMENTS RESULTATE/PRESTASIES	PLAN NO
1. SERVICE AT COUNTER				
• Registered lending transactions	No of people in a queue per time measured at 100 given times	3 people in a queue 90% of the time	OM counter 90% SV counter 93%	37, 38, 39, 40, 41
	No of complaints reported	3 mistakes per person per year	30 mistakes in total reported Febr - June (± 3 per staff member)	
• Issued library admission cards	No of people in a queue per time measured at 100 given occassions	3 people in a queue measured at 100% of the 100 measured times	Access point: 100%	42
	Client surveys : - Competence - 90%		Competence: 91%	43
	- Friendliness - 90%		Friendliness: 82,8%	
	- Helpfulness - 90%		Helpfullness: 92,3%	44
2. CONTROL OF LIBRARY MATERIAL				
• Issued accounts	% of accounts rendered against the total of books issued	Less than 2%	1,5% accounts rendered	45
	% of written off debts against accounts rendered	0%	94 : 0,077%	
3. COLOUR COPIES				
• Colour reproductions	No of reproductions per month	1000 per month (R2255,76 x 2) = R4511,52	Average Jan - June : 630 (R3229,77)	46, 47, 48

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OPERATIONAL KPAs & PRODUCTS (Form 3.1) DATE: 28 JULY 1995
OPERASIONELE SPAs & PRODUKTE (Vorm 3.1) DATUM:

DIVISION: LMSD AFDELING:	PERFORMANCE REVIEW & MANAGEMENT PLANNING PRESTASIEOORSIG & BESTUURSBEPLANNING	COMPILED BY: PR Botha OPGESTEL DEUR:		
SUBDIVISION: ITSS ONDERAFDELING: Goal / Doelstelling:	To serve the Library in the reaching of its stated goals through the effective application and support of Information Technology.			
KEY PERFORMANCE AREAS / PRODUCTS SLEUTEL PRESTASIE AREAS / PRODUKTE	MEASURES MAATSTAWE	OBJECTIVE/TARGET DOELWITTE	RESULTS/ACHIEVEMENTS RESULTATE/PRESTASIES	PLAN NO
1. TECHNICAL SUPPORT The provision of a high level of technical expertise and quick turn-around times to problem reports, to enable staff to extract the maximum benefit from equipment and software	1.1 Average down-time of workstations from problem report to rectification 1.2 Recurrence of problems as % of job callouts 1.3 Average response time from problem report to attention	1.1 Maximum 24 hours per report that isn't referred to DCS 1.2 Maximum 5% of problem reports 1.3 8 hours	1.1 Estimated 36 hours per problem report 1.2 Estimated 10% of problem reports 1.3 Estimated 12 hours **(These figures will now be monitored by TechTrak and accurate figures will be available in future)**	1,2,3,14,15
2. TECHNICAL SELF-HELP SKILLS The cultivation of a culture of self-reliance in basic computer skills, through ongoing training as well as scheduled training sessions.	2. Occurrences of elementary queries that could have been prevented by self-help skills	2. 20% of problem reports	2. 33% of problem reports	4
3. CUSTOMER-CARE SERVICE The fostering of a perception that library staff and clients are the clients of ITSS, and as such are entitled to our very best service.	3.1 Customer satisfaction 3.2 Customer expectations and needs 3.3 Customer perception of ITSS as: - friendly - helpful - knowledgable experts in our fields	3.1 Identification of dissatisfaction in service 3.2 Determining client needs and expectations 3.3 Build trust and reliance on ITSS	3. New measures which will be implemented in the next 6 months	2,3,4,6,12

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PROJECT KPAs (Form 3.2)
PROJEK SPAs (Vorm 3.2)

DATE: 28 July 1995
DATUM:

DIVISION: LMSD AFDELING:	PERFORMANCE REVIEW AND MANAGEMENT PLANNING PRESTASIEOORSIG EN BESTUURSBEPLANNING	COMPILED BY PR Botha OPGESTEL DEUR:
SUBDIVISION: ITSS ONDERAFDELING: Goal / Doelstelling:	To serve the Library in the reaching of its stated goals through the effective application and support of Information Technology.	

KEY PERFORMANCE AREAS / PROJECTS SLEUTEL PRESTASIE AREAS / PROJEKTE	OBJECTIVE DOELWITTE	ACHIEVEMENTS PRESTASIES	PLAN NO
1. SYSTEMS DESIGN AND DEVELOPMENT The provision of Library and Information Systems that are effective, accessible and available.	1.1 To develop ad hoc programs to address specific requirements. 1.2 To integrate the diverse information systems into a central information repository with seamless access and easy-to-use interfaces. 1.3 To optimally configure existing systems and workstations with reference to ease of use, maintainability, stability and efficiency. 1.4 Advise and guide stakeholders in the incorporation of unique Library functions (Postal Requests, Study Collection and Financial Modules) into the Library System	TechTrak system CDROM Network refinements Taskflow system refinements Unisa Explorer Menu LiSI project ERL investigation McGregors & BFANet systems	1,3,4,5,7, 8,9,10, 11,16,17, 18,19
2. LIBRARY AND INFORMATION SYSTEMS ADMINISTRATION Efficient administration of the various systems and projects in our domain.	2.1 To effectively control access to systems and functions with the minimum inconvenience to the authorized user. 2.2 To provide timeous and accurate statistics on systems utilization where applicable. 2.3 To update databases and systems to ensure clients have the most up-to-date information available. 2.4 To maintain an accurate register of IT resources in use throughout the Library. 2.5 To maintain a central register of IT projects in the library. 2.6 To administer and coordinate various tasks relating to the investigation into a new Library System (LiSI project)	UNIS, CDROM Servers, ERL access control enables users to perform their tasks, but prevents unauthorized entry and actions. CDROM servers: Informed decisions for acquisitions can be based on usage patterns experienced during actual use, eliminating under-utilization and reducing costs. Updating of McGregors, BFANet, CDROM databases are an administrative nightmare and very time-consuming. Stock register on Word Perfect Task flow system Overseas visit, local vendor visits, shortlist	3,4,5,12, 13,19

PROJECT KPAs (Form 3.2)
PROJEK SPAs (Vorm 3.2)

DATE: 28 July 1995
DATUM:

DIVISION: LMSD AFDELING:	PERFORMANCE REVIEW AND MANAGEMENT PLANNING PRESTASIEOORSIG EN BESTUURSBEPLANNING	COMPILED BY PR Botha OPGESTEL DEUR:
SUBDIVISION: ITSS ONDERAFDELING: Goal / Doelstelling:	To serve the Library in the reaching of its stated goals through the effective application and support of Information Technology.	

KEY PERFORMANCE AREAS / PROJECTS SLEUTEL PRESTASIE AREAS / PROJEKTE	OBJECTIVE DOELWITTE	ACHIEVEMENTS PRESTASIES	PLAN NO
3. EXPERT TECHNICAL ADVICE AND GUIDANCE The provision of expert advice to staff and other stakeholders on the state of the art as well as possible applications of technology to library processes and services.	3.1 To provide advice to library staff and stakeholders on the technical implications and requirements of envisaged systems 3.2 To promote IT awareness - To provide a continuous stream of technical news, tutorials and features to Library Staff and other stakeholders 3.3 To evaluate new technological advances and provide advice to Library Staff on possible applications thereof to Library processes and procedures 3.4 Advise and train technical support staff on the solving of more complex problems.	3. Continuous to staff, especially through CITDEV and related workgroups	14, 15
4. IT RESOURCE MANAGEMENT Provision of the most up-to-date equipment and associated software possible within the financial constraints of the budget, and to optimally utilize such equipment.	4.1 To budget for, procure and coordinate the placement of equipment and software 4.2 Optimal utilization of resources to minimize costs and improve productivity by aligning equipment levels with tasks and needs 4.3 To investigate and implement resource sharing wherever possible/feasible in order to leverage investments in equipment and software. 4.4 To pressurize University Management into providing requisite levels of equipment across the campus.	4.1 Annually, but ad hoc as new needs arise. 4.2 Continuous, with annual revision 4.3 Print servers, one laser printer per floor resulted in a 80% reduction in requests for new laser printers. CDROM network resulted in 95% reduction in requests for CDROM drives.	3, 9, 10, 11, 17, 18

DIVISION: LIBRARY MANAGEMENT SERVICES
MANAGEMENT PLANNING
AFDELING:

DATE: 28 July 1995
ONDERAFDELING: ITSS

SUBDIVISION: INFORMATION TECHNOLOGY AND
COMPILED BY: PR BOTHA
PRESTASIEOORSIG EN BESTUURSBEPLANNING

PERFORMANCE REVIEW AND

DATUM:
OPGESTEL DEUR: PR BOTHA

SUBDIVISION: ONDERAFDELING: Goal / Doelstelling	To serve the Library in the reaching of its stated goals through the effective application and support of Information Technology.		
NO	PLAN: Heading & short discription	RESPONSIBLE VERANTWOORDELIK	DATE DATUM
1	Techtrak - Utilization of networked software to track problem notification and rectification	PR Botha	Dec 95
2	Regular publication of Techtrak statistics	To be determined	Jun 96
3	Remote workstation administration - configuration and maintenance of workstations from a central workstation via the network	PR Botha	Dec 95
4	Automatic backup of important files to the Library's home server	PR Botha	Dec 95
5	Revision of task flow system to utilize networking facilities	To be determined	To be determined
6	Public Relations Campaign - to improve the visibility of ITSS and the perception of our role.	Entire subdivision	Dec 95
7	Unisa Explorer - integrated workstation for client use	To be determined	Dec 96
8	Electronic Reference Library - cancellation of subscriptions in favour of ELSA	PR Botha	Jun 96
9	Investigate the possible conversion of a CDROM server to an ERL server for uniform search interface, improved performance & dial-up access	PR Botha	Jun 96
10	WordPerfect InForms - investigate possibility of replacing various hardcopy forms with network software	Marcel Vierbergen	Dec 95
11	Identify and implement software to allow Windows programs to be run from arbitrary servers and volumes.	PR Botha	Jun 96
12	Monthly report on CDROM and other database usage patterns to Subject Librarians	PR Botha	Sept 95
13	Investigate longer intervals between updates, alternatively spreading of the load.	PR Botha, DCS, Subject Librarians	Nov 95
14	Members of ITSS desperately need to be trained further, in order to retain their edge. Alternative finances should be investigated.	Subdivision	Mar 96
15	Exposure to peers in industry - attend user groups and conferences	Subdivision	Mar 96
16	Upon implementation of cost centre - investigate alternative sourcing of equipment and software	PR Botha	To be determined
17	Centralized scanning facility for library staff use	To be determined	Jun 96
18	Citrix server product - Dial-up access to LAN	PR Botha	Dec 96
19	Expand TechTrak to incorporate stock control - record service history per IT resource	To be determined	To be determined

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STRATEGIC IMPLEMENTATION (Form 1)
STRATEGIESE IMPLEMENTERING (Vorm 1)

DATE: JULY 1996
DATUM:

DIVISION: DOCUMENT DELIVERY
AFDELING:

PERFORMANCE REVIEW & MANAGEMENT PLANNING
PRESTASIEBOORDEL & BESTUURSBEPLANNING

COMPILED BY: J RAUBENHEIMER
OPGESTEL DEUR:

STRATEGIC IMPLEMENTATION STRATEGIESE IMPLEMENTERING	CORPORATE GOAL/POLICY KORPORATIEWE DOEL/BELEID	DIVISION GOAL AFDELING DOEL	ACHIEVEMENTS PRESTASIES	PLAN NO
AFFIRMATIVE ACTION /EQUITY & EXCELLENCE/ REGSTELLENDE AKSIE /Gelyke behandeling/	1. Representative workforce 2. Realisation of staff potential 3. Equal opportunity 4. Cultural diversity 5. Democratic workplace	1. Identification of suitable candidates through revised selection and recruitment procedures, and employing wherever possible, people from disadvantaged groups in cases of new appointments and/or resignations. 2. Development of staff potential through focused informal training, relevant courses and staff evaluation processes	Ratios: B W M F Bkl Wkl Bf Wf SAB+ 4 10 5 9 1 4 3 8 ABA- 53 39 57 34 47 10 6 19 Totals: 57 38 62 33 48 14 9 24 %: 60 40 66 35 60 15 10 25 (What has been done?): 1. Appointment of BF and WM in top structure of division 2. Female shelver and photocopier	1 2
SERVICE & CLIENT CARE / DIENS & KLIENT-TEVREDENHEID	1. Satisfy the demands of our stakeholders (staff and clients)for participation in decisions that affect them. 2. Improve service effectiveness and productivity by increasing stakeholder participation. 3. Promote two-way communication between personnel and clients	To address all enquiries and complaints without delay	1. Client care section implemented 2. Service criteria for counter staff developed	3, 4, 5
CLIENT NEEDS / BEHOEFTES VAN KLIENTE	1. Proactively address client needs within the parameters of our goals 2. Have appropriate structures available to deal with student demands	1. Identification of client needs with regard to lending and requesting services, the delivery of documents and provision of study facilities 2. Obtain feedback on the needs and requests of stakeholders, based on democratic principles	1. End user access to ILL module 2. User surveys 3. Evaluation of counter assistants by clients 4. Suggestion boxes at counters 5. Study facility (24 hours plus Sundays) during exam periods	6 7 8, 9
IT DEVELOPMENT / IT ONTWIKKELING /With reference to the Corporate IT Development Plan/ /Met verwysing na die Korporatiewe IT Ontwikkelingsplan/	1. Fully integrated Library & Information System 2. Training 3. Access 4. IT Management 5. Workstations 6. IT Research 7. Data base creation 8. Electronic text 9. Document request & delivery 10. Collection development policy	1. The application of IT in order to speed up lending, requesting and delivery processes	1. Minute scan, store and retrieval system identified and accepted in principle 2. Scan and fax project for ILL document finalised 3. Ariel system identified 4. Track and trace postal system implemented	10 11 12 13
FINANCES/FINANSIES	1. Partnerships with common interest institutions 2. Cooperative agreements to optimise resources 3. Generating funds from sale of services 4. Raising funds for specific projects 5. Maximum utilisation of resources via cost- effective management 6. Continually improving efficiency and productivity 7. Commitment where economical to the principle of access instead of ownership	1. Identify ways to generate funds	1. Refurbishment of photocopying room - cost free 2. Ariel system donated by SEB 3. Minute project to be tested at no cost 4. Value added service to community service members implemented 5. Appointment of student workers in full time posts - as an experiment	14 15 16 17

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Appendix 5

ULEXIS **Performance Indicators**

Existing corporate performance measures of the Library

% client satisfaction with overall service (visiting clients)
client satisfaction with library collections: satisfaction = <mean of actual performance> - <mean of expected performance>
% availability of information sources (visiting clients):
- recommended books
- research publications
- periodicals

productivity: book issues per staff member

Existing performance measures of subdivisions

DOCUMENT DELIVERY DIVISION

Subdivision: Request Services

% postal book requests supplied within 2 working days
% client satisfaction with postal book requests service
% recommended books shelved within 24 hours of return
% postal periodical requests supplied within 7 working days
% client satisfaction with postal periodical requests service
% periodicals shelved within 24 hours after use
% photocopied documents produced within 2 working days
% client satisfaction with photocopy service (visiting clients)
% campus client satisfaction with photocopy facilities and service

Subdivision: Lending Services

number of clients in a queue at any given time
% lending problems solved within 7 working days
% accounts rendered of total books issued
% written off as bad debt of total accounts rendered
% books written off of total books issued
number of colour reproductions produced per month

Subdivision: Interlending & Support Services

average number of days to fill requests from other libraries
average number of days to notification of unavailability
% information sources obtained from other libraries within 21 days
% postal articles distributed within 24 hours of receipt
% research publications shelved within 24 hours of return
% research publications incorrectly shelved
% occupancy of study seats in peak hour

CLIENT SERVICES DIVISION

Subdivision: Research Services

% client satisfaction with archival finding aids
number of linear metres of archival documents added annually
% availability of audiovisual items (visiting clients)
% postal audiovisual item requests supplied within 2 working days

% client satisfaction with audiovisual service (visual clients)
% client satisfaction with specific aspects of literature lists (such as relevance)
% literature search requests filled within 14 days
index of client satisfaction with accuracy & timeliness of inquiry and advice service
index of client satisfaction with composition & comprehension: research collection
index of client satisfaction with composition & comprehension: periodical collection
% contact with subject librarians by specific client groups

Subdivision: Study Services

% availability of recommended books (visiting clients)
% recommended books on waiting list of total recommended book issues
% corrections of Tutorial letter 101 returned to lecturers
dates of last batch orders placed for recommended books
number of composite readers produced annually
% client satisfaction with assistance and information provision
% availability of recommended books at branch libraries (visiting clients)
% client satisfaction with service at branch libraries

TECHNICAL SERVICES DIVISION

Subdivision: Acquisitions

% Duplicate orders of total book orders
average number of days between ordering and accessioning of books
% books acquired of total book orders
% periodicals obtained before third claim
% price increases per agent
numbers of days between accessioning of books and payment of invoices
% over or under spending of budget

Subdivision: Descriptive Cataloguing

% order records processed within 7 days
number of order records processed per staff member per day
% bibliographic records completed within 10 days
% errors in MARC fields referred back
number of bibliographic records completed per staff member per day
% errors in final processing of item records

Subdivision: Bindery

% completed binding work of total documents for binding
% errors in binding work
% books bound within 30 days
% periodicals bound within 50 days
number of documents bound per staff member

Subdivision: Subject Cataloguing

% records completed within 40 days
% express records completed within 1 day
% hit records completed within 5 days
% correctness of non-verbal subject catalogue records completed
% consistency of verbal subject catalogue records completed
number of LC subject headings assigned per record
% correctness of authority control
% completeness of authority control
% identified database management projects completed
% items indexed of total items for indexing
number of indexed records submitted to ISAP

LIBRARY MANAGEMENT SERVICES DIVISION

number of hours between reporting a technical computer problem and rectification
% recurrent problems of total job call-outs
% problems that can be rectified by self-help skills of total job call-outs
% client satisfaction with IT support service

LIBRARY PERSONNEL AND CLIENT DEVELOPMENT DIVISION

none

Discussion

Peter Wynne, University of Central Lancashire: You cite 20% cases of failure owing to insufficient information given by users. If users are at a great distance, do they establish if the item is available and how?

John Willemse: We are not very happy that we are mail order service for students and one of the things we are looking at is how they could become library users in a fuller sense. Lecturers say they must use the library, but all they do is to fill in a card, use a teletype service, or if they have it, e-mail. We also have a telephone request service on a limited basis. These requests are from a list provided by the lecturer for a particular assignment and to ensure that they are requested in the right way, each study letter of about 1500 courses is checked by my staff before it is actually printed to ensure the lecturer does not refer to, for example, the author and title of a chapter in a composite work, which might provide us with problems. It's a way of focusing in on the problems and taking action to address them. Perhaps I should have stressed more strongly that our measures always try to determine the reasons for failure so that they can be addressed. We are not only concerned with how well we are doing.

Roswitha Poll, Universitäts- und Landesbibliothek Münster: Is there any recall from your users? It must be very difficult dealing with them at a long distance.

John Willemse: Again, we do it in various ways. We do one survey on the postal requests, which of course is easy, and we do one at the door for those using the library in person. So the postal request is on the exact items requested, whether they are available immediately or not. At the beginning we started by doing just the one survey on the door until we discovered that it does not indicate the failures because many people may not find what they came for but may find other things and tell you that they found more than they asked for. So we changed the questionnaire and now ask for the number of failures, rather than for items positively identified.

Roswitha Poll: Have you any response from your teaching staff on what you are doing?

John Willemse: We have various surveys. For instance of the subject librarians, who serve people on an individual basis. We now do a once-a-year survey of a sample of lecturers on their satisfaction with the service in general.

Zamiyah Baba, University of Wales, Aberystwyth: You said your target of 90% for recommended literature was found to be unrealistic.To what extent are the reasons attributable to the library rather than to other factors? And what now is a realistic target?

John Willemse: We feel that we need to address this each year and try and do a little better. But how far can we go? We feel it doesn't matter. As in athletics - at one stage speed was measured in seconds, then in tenths of seconds, and now in hundredths of seconds. Just trying to do better each year seems to me to be the only realistic way to go. I do not know how far we can go. It depends on so many external factors. If our funding keeps being cut - and it needn't even be cut - with 10% inflation and exchange rate changes, it keeps on being reduced in real terms. Growth of student numbers is another factor that impacts on this issue.

Marareta Torngren, University of Stockholm: I am interested in how your staff were organised to carry out this work over the ten years. Did you start with some who then taught others? How have you developed your staff. How many are involved in this?

John Willemse: [Very briefly in little time available.] We have five Division Heads and 14 Sub-Division Heads and they are all are involved. The Division Head goes through the process with his Sub-Division Heads and discusses it with them and with me.